Creating a Private Adoption Assistance Agreement

Note: Assignment to the Adoptive Home-Private Adoption case is needed to create the agreement.

Related User Guides
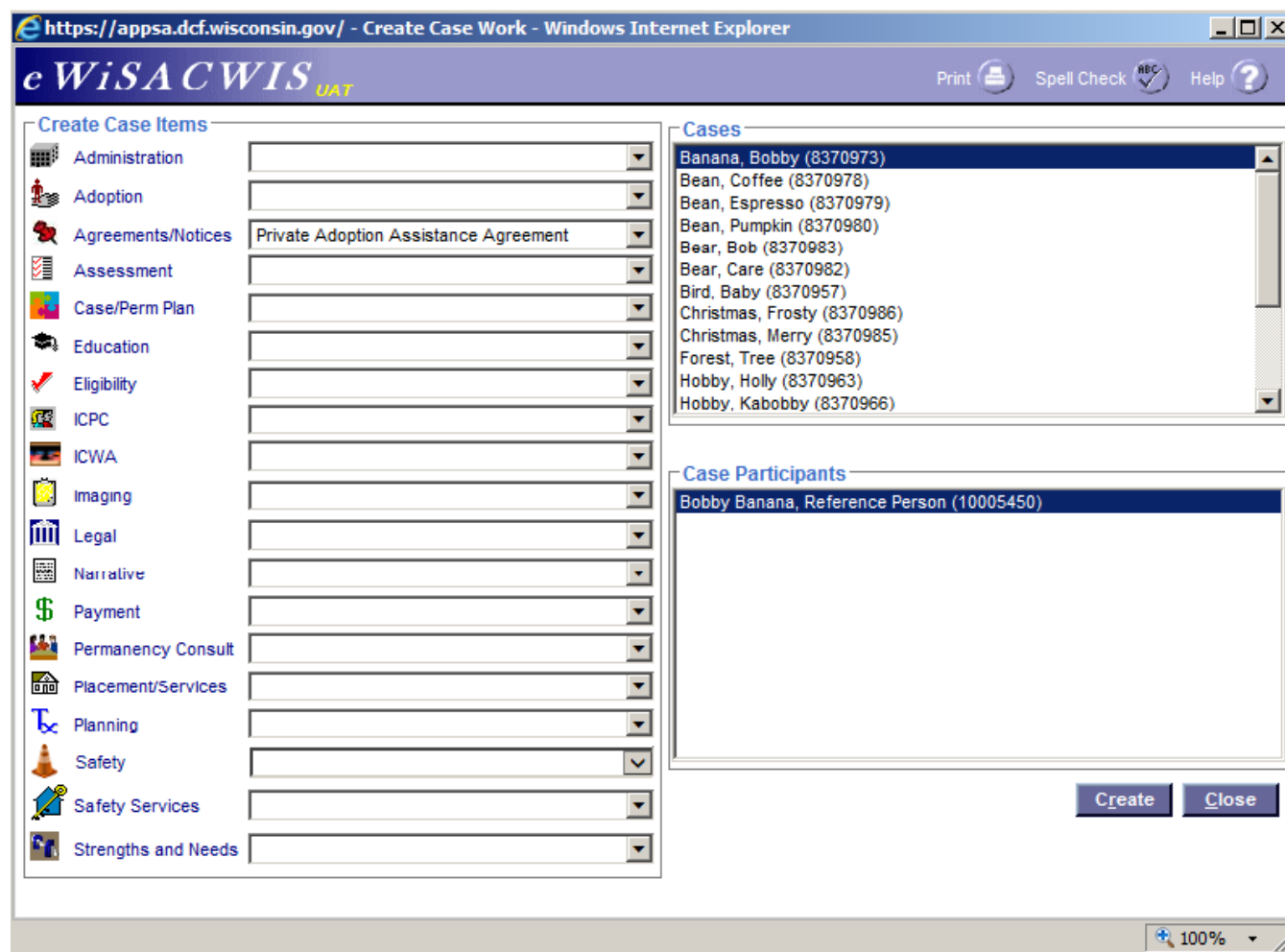[Adoption Assistance Amended Agreement](#)
[Ending an Adoption Assistance Agreement](#)
[Reopening an Adoption Assistance Agreement](#)

To create a Private Adoption Assistance Agreement, the following pieces of work must be completed (and approved):

- Screened-In Adoption-Private Adoption Service Report
- Provider Record
- Child & Adolescent Needs & Strengths (CANS)
- Legal Record of 'Adoption Finalized'

1. From the desktop, select Create > Case Work or click the Case Work button to open the Create Case Work page.

2. On the Create Case Work page, select 'Private Adoption Assistance Agreement' from the Agreements/Notices drop-down. Select the appropriate Case and Participant and click Create to open the Adoption Assistance Agreement page.

3. Enter the Private Adoption Assistance Agreement. The agreement is divided into the following group boxes: Agreement Information, Adoption Assistance Payee, Supplemental Rate, and Payment Information. The following describes both pre-filled and user entered fields for each group box.

A. Agreement Information
- Case Participant: Prefills with the child's name as a hyperlink (to Person Management).

- Date of Agreement: User entered start date of the Private Adoption Assistance Agreement, and when payment begins.

- Agreement Type: Defaults to Adoption Assistance Agreement.

- Estimated End Date: Prefills the date of the child's 19th birthday.

- Private Adoption Type: Prefills value from Services Report (editable).

- Agreement Amount: Prefills with the total of the Basic, Supplemental, and Exceptional amounts.

- Adoption Subsidy Type: Select the value to designate the type of subsidy specific to the agreement.

Note: To qualify for an adoption subsidy (MA w/ subsidy amount), at least 5 CANS items (used in the rate algorithm) must be rated as a 2 or 3 unless the child qualifies for at least one Applicable Exception:

- Provider Name: Click the **Search** hyperlink to find the Provider. Once selected, the Provider will prefill to the Agreement as a name hyperlink (to Provider Management).

- County: Prefills as 'State'.

B. Adoption Assistance Payee

- Payee Name Type: If Parent 1 and Parent 2 are listed on the agreement, the value of 'Parent 1 or Parent 2' will automatically be defaulted once a Provider is associated to the agreement. The Payee Name Type field remains enabled, even after approval of the Adoption Assistance Agreement. The payee(s) displayed for the Payee Name, pre-fill to the AAFC Adoptive Home service page.

C. Supplemental Rate:

- Prefills information from the most recently approved CANS.

D. Payment Information:

- Basic Rate: Prefills basic rate based on the age of the child at the time of the agreement.

- Supplemental: Prefills amount based on the most recent, approved CANS.

- Exceptional: If applicable, select the Exceptional checkbox and enter an amount. Provide an explanation in the Payment Justification narrative box. Refer to policy for details on acceptable justifications.

4. Next, send the Private Adoption Assistance Agreement for approval by selecting 'Approval' from the Options drop-down and clicking Go. On the Approval History page, select the Approve radio button and click Continue to return to the Private Adoption Assistance Agreement page. Click Save on the Private Adoption Assistance Agreement page to send for approval.

5. Upon supervisory approval, eWiSACWIS will automatically create a fully approved AAFC Adoptive Home Service. The begin date of the Service will be set to the Date of Agreement and the child-specific rate will be set to the agreement amount.

📁 Banana, Bobby (8370973)   Actions
Adoptive Home - Private Adoption (Agency)   05/30/2014   Bee, Worker   State Central Office   555 Fruity Lane , Sun Prairie, WI 53590
☎ Access Reports
🦞 Agreements and Notices
  🤝 Private Adoption Assistance Agreement (Agency) - $792.00
       06/01/2014   Banana, Bobby
🗃 Assets and Income
🏢 Assignment
✔ Eligibility
🏛 Legal
$ Payment
℞ Planning
👪 Related People
👫 Services
   Open Services
   👫 Service - AAFC Adoptive Home
       06/01/2014   Berry, Straw   Banana, Bobby   State   Approved